

County of Orange Office of the Clerk-Recorder



It is our mission to provide efficient service to the public in a way that exemplifies the highest standard of courtesy, cost effectiveness, and ethical performance. Public records will be readily accessible to citizens/taxpayers in a convenient manner while safeguarding confidentiality and the security of those records.

Business Plan

2003

Tom Daly
Clerk-Recorder

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I. EXECUTIVE SUMMARY

The Clerk-Recorder's 2003 Business Plan presents a high level overview of the services the Department provides, 2002 accomplishments, goals for 2003 and strategies to achieve those goals.

The Office's value to the public is defined by our 2003 mission statement:

"The Clerk/Recorder's Office mission is to provide a reliable repository for public records and to provide efficient service to the public in a way that exemplifies the highest standard of courtesy, cost effectiveness, and ethical performance. Public records will be readily accessible in a convenient manner while safeguarding confidentiality and the security of those records."

In 2002, the Clerk-Recorder received a record number of transactions in the majority of its business areas. The Department met this challenge while dramatically increasing its contributions to the County's General Fund. The Department continues to maintain the lowest document fees in the State. The Clerk-Recorder was able to respond to the increased workload with minimal increase in staffing by continuing its multi-year commitment to develop and implement state-of-the-art technology. This is further exemplified by the commitment and dedication of the Department's workforce in meeting its business goals.

Some of the office's major achievements in 2002 were:

- In May of 2002, the Department implemented a free online Fictitious Business Name search function and a free online Vital Record order service, resulting in easier, quicker access for people who cannot or prefer not to come into the office.
- In 2002 the Department added links to our web site to some of the most commonly used recordable document forms, free of charge.
- In an effort to meet the public's demands for cost effective and timely service, we continued to strive for a consistent 72-hour turnaround on mailed recordable documents.

- In April of 2002, the 20 Day Notice Matching process was automated. This program automatically matches a Notice of Completion recorded to a specific 20-Day Notice.
- In August of 2002 the Department installed scanners at the two front public counters. This “one-stop-shop” enables staff to scan, record and return a document to the public in a matter of minutes.
- In May of 2002, in an effort to tighten security for electronic recording users, the Memorandum of Understanding was revised to include additional security features provided for all users.
- A total of 1.7 million documents have been recorded electronically since program inception in 1997. This program is the first in the nation and is overwhelmingly successful.
- The marriage ceremony room was remodeled, using turn of the century décor in the Historical Courthouse, and customers now supply marriage license information electronically, thereby speeding processes and eliminating redundant data entry.
- Several new automation programs enhance our value to the public:
 - A new cashiering system adds controls over the \$61 million in revenue processed annually.
 - A new numbering system allows eight versus six digit numbers to be recorded, allowing for our record high document recording activity.
 - Public internet access to Fictitious Business Name information has been met with overwhelming favor.

2003 Goals:

Building on 2002 achievements, the office is committed to ensuring continuity and provide value to the community:

1. Provide prompt and reliable service to the public
2. Enhance public records accessibility
3. Safeguard security of the public's records

II. 2003 MISSION & GOALS

A. MISSION STATEMENT

The Clerk-Recorder's mission statement includes the commitment of each employee in confirming our desire to provide the highest level of service to the public we serve.

"The Clerk/Recorder's Office mission is to provide a reliable repository for public records and to provide efficient service to the public in a way that exemplifies the highest standard of courtesy, cost effectiveness, and ethical performance. Public records will be readily accessible in a convenient manner while safeguarding confidentiality and the security of those records."

B. GOALS

1. GOAL: PROVIDE PROMPT AND RELIABLE SERVICE TO THE PUBLIC

a. Key Outcome Indicator:

Continue customer satisfaction surveys, which rate overall value of our service to the public.

The value provided by the services the office provides is a key portion of our mission statement. One method to rate service to the public is to provide customer satisfaction survey forms for completion. Public response to this opportunity to rate performance has been overwhelming.

Another measure of our performance is our cost-effectiveness to the tax-payers. The Orange County Clerk-Recorder's Office provides the highest level of service at the lowest cost-per-service unit of any major county in California. When compared to California counties with population above one million, the Orange County Clerk-Recorder has the least staffing ratio of any comparable county.

b. Key Outcome Indicator Reporting:

Performance Measure	2001 Results	2002 Anticipated Results	2003 Plan
What: Survey forms measure customer satisfaction and ensure we are addressing customer needs. Why: Quality customer service is our top priority.	Survey results are 97% above standard	Survey results are 98% above standard	Survey results are targeted to be 98% above standard

2. GOAL: ENHANCE PUBLIC RECORDS ACCESSIBILITY**a. Key Outcome Indicator:**

The number of documents utilizing Electronic Recording.

In an effort to maintain the highest level of service, the Department will continue to automate functions within both the Clerk and Recorder areas. In addition, in the coming year the department will continue to redesign and implement enhancements to our web page including suggestions made by the public.

b. Key Outcome Indicator Reporting:

Performance Measure	2001 Results	2002 Anticipated Results	2003 Plan
What: This measurement provides higher levels of transactions with minimal staffing increases. Why: Public has access to recorded documents within short timeframes.	162,490 documents using Electronic Recording were processed	443,267 documents using Electronic Recording will be processed (325,221 processed through Sept. 2002)	600,000 Electronic documents targeted for processing

3. GOAL: SAFEGUARD SECURITY OVER THE PUBLIC'S RECORDS

a. Key Outcome Indicator:

Number of records converted to alternate media to ensure ease of access and preservation and safety.

The office continues to be concerned with fraud involving stolen identities. This sometimes, but not always, originates with perpetrators making use of public records available in the Clerk-Recorder's Office, such as birth and death certificates, to falsely assert identity. The Office was the first in the State to require identification of persons who request copies of vital and other records.

This year the Department will continue exploring areas of possible vulnerability and develop means to correct any weaknesses. In addition, the Department will continue educating the public through targeted workshops dealing with identity theft and fraud and will continue to work with internal and external shareholders.

b. Key Outcome Indicator Reporting:

Performance Measure	2001 Results	2002 Anticipated Results	2003 Plan
<p>What: This measurement is a tool to evaluate efforts to provide access and safeguard the public's records.</p> <p>Why: To provide added security of public records now and for future retrieval.</p>	<p>1. 573,000 vital records transferred from microfilm to digital images.</p> <p>2. 961,047 Official Records were digitized.</p> <p>4. 87,776 Vital Records were digitized.</p> <p>3. 963,518 recordable documents were digitized.</p> <p>4. 36,407 FBN's digitized.</p>	<p>1. One million Official Records will be processed to digital images.</p> <p>2. 90,000 Vital Records will be processed to digital images.</p> <p>3. 1.1 million recordable documents will be processed to digital images.</p> <p>4. 50,000 confidential marriages will be converted from paper to digital images.</p>	<p>Over 2.5 million documents targeted for processing to digital image.</p>

III. 2003 OPERATIONAL PLAN

A. Overview

1. Office Organization and Services

The Clerk-Recorder's Office is comprised of two (2) major divisions:

- Recorder Services and Systems - which records and processes real property documents and supports office wide automation.
- Clerk Services, Archives, and Administration - which issues marriage licenses, files fictitious business statements, provides birth, death and marriage certificates, handles official records requests, maintains the County archives, and provides office-wide administration support.

The County Clerk-Recorder is responsible for examining and recording all documents presented for recording that deal with establishing ownership of land in the County, or as required by statute, and maintains a permanent record and indexes of all documents for public viewing.

In addition, the Clerk-Recorder provides certified copies requested by the public; recording of all lawful documents such as deeds, deeds of trust, judgments, liens, affidavits, Uniform Commercial Code Financial Statements, etc; and the filing of Births, Deaths, and Marriage records.

The Clerk-Recorder files records of surveys, parcel maps, subdivisions, and assessment maps and Assessor's Plat Maps. The Office also issues Marriage Licenses; Fictitious Business Name Statements; licenses for Photocopier, Process Server and Unlawful Detainer Assistance; performs civil wedding ceremonies; administers oaths of office; and maintains Official County Records and indices for documents pertaining to the above activities.

2. Focus

The focus of this year's planning is in the area of enhanced automation to expand access to public records, streamline operations for faster, more cost efficient services, and maximize document security to reduce opportunities for identity theft.

The Department continues to focus on new automation techniques and public outreach to enhance service levels, educate the general public, and to make services available twenty-four hours per day, seven days per week (24/7) from the convenience of the public's homes/offices or neighborhood locales.

B. Clients

The Office provides services to the public at large, including current and past Orange County residents. Specific clients are referenced below:

1. EXTERNAL CLIENTS INCLUDE:

- Title and escrow companies use Recorder services
- Lending institutions use Recorder services
- Business owners use Fictitious Business Name services
- Contractors and sub-contractors use Recorder services
- County Notary Public's use Official Record services
- Authorized Notaries use Marriage License services
- Internal Revenue Service and Franchise Tax Board uses Recorder services
- Parents registering their children for school or sports teams use Vital Record services
- State agencies and Orange county cities share in revenue collection from various units in the office

2. INTERNAL CLIENTS INCLUDE:

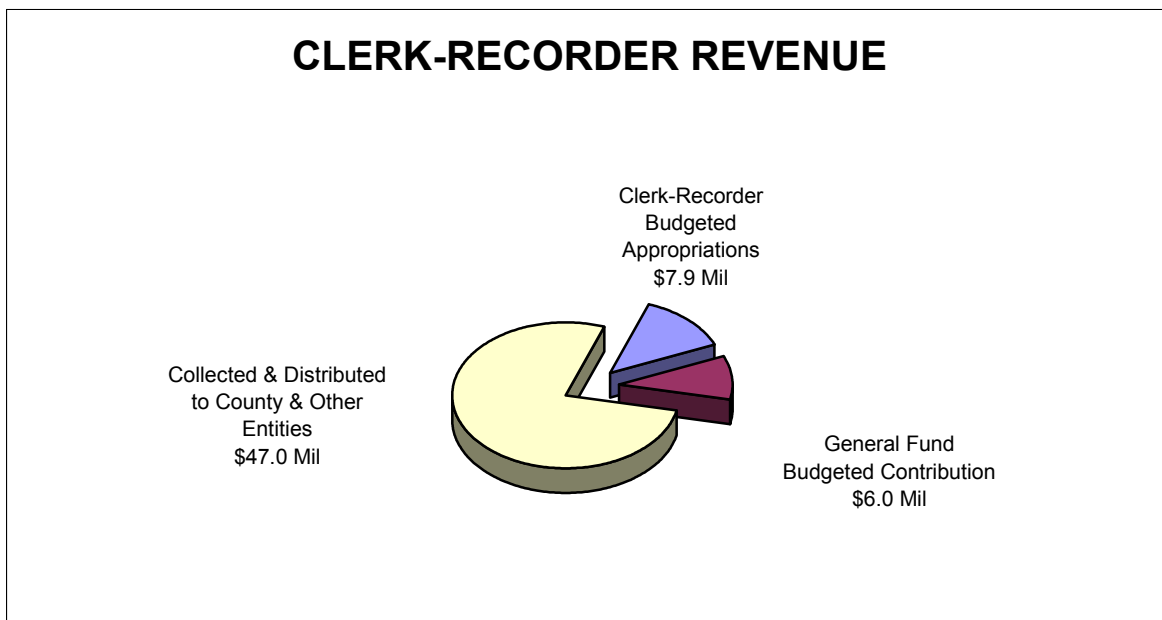
- Tax Collector-Treasurer
- Health Care Agency
- Assessor's Office
- Historical Commission
- PFRD
- District Attorney's Office
- Office of Child Support Services
- Sheriff-Coroners Office

3. ISSUES ASSOCIATED WITH CHANGING CLIENT GROUPS

- a. Identity fraud continues to be of major concern statewide. Enhanced interaction with client groups including the D.M.V. , the District Attorney's Office, and local police departments will be necessary to curb this growing problem.
- b. Increasing real property recordings will necessitate increased use of Electronic Recording (ER). In order to ensure timely property recordings, introducing additional title companies, escrow companies, and lending institutions into the ER program will be a priority.

C. Resources

The FY 2002-03 budget for the Clerk-Recorder's Office is \$14.4 million (\$7.9 million appropriations). Funding is derived from fees for recording documents (94%) and fees for service (6%). There is no net county cost for the Office; in fact, approximately \$6 million in revenue is returned to the County General Fund. Due to record high real property recording activity, it is anticipated that additional revenue will be collected this year.



There are 102 Clerk-Recorder staff members allocated to serve the public. When compared to other Clerk-Recorder Offices who serve populations above one million, the Orange County Clerk-Recorder has the lowest staff-to-population ratio in California. This is, in part, due to the office's focus on enhanced automation.

The value of the workforce continues to increase. Cross-training, teamwork and commitment to quality public service makes our employees the Office's most valuable asset. Over the past year staff resources have been stretched due to record high real property recordings. Employee's commitment to "getting the job done," coupled with the use of extra-help staff for the heavy volume of work, ensures the public that documents will be recorded in a timely manner.

Sharing resources and electronically processing many documents has resulted in cost avoidance and streamlined workflow. These include:

- The Orange County Tax Collector (TLC) application automates the recording process of Orange County Tax Collector liens. These liens are now recorded automatically with data imported directly into our database, instead of paper processing.
- The Department of Child Support Services now electronically processes all Abstract of Support Judgements for recording in Orange County.
- The Franchise Tax Board (FTB) process is an application that automates the recording of tax liens filed by the Franchise Tax Board. Liens are recorded automatically and data is imported directly into the County's database, eliminating all data entry.
- Electronic recording with the Clerk of the Board for recordation of all items approved by the Board of Supervisors has been implemented.
- The Clerk-Recorder's Office electronically provides the Assessor's Office with changes of property ownership title, parcel maps, etc. which are used to review property values and land splits.

GOAL 1- Provide prompt and reliable service to the public.***1. Challenges***

- Developing a means to disseminate information to the public as to the public record information available, continues to be a challenge. In 2003 the Office will attend community meetings to discuss our services, provide workshops, work with the media to highlight new services, and explore out-stationed services at public libraries or city centers.
- Attracting, training, and retaining reliable staff who enjoy serving the public is often challenging. In addressing this challenge, as part of the interview process, applicants are required to read and respond to the office's mission statement. Also, employees are provided on-the-job training, with career goals/ aspirations addressed.

2. Strategy

- a. Hire and train diverse staff to ensure bilingual skills, especially Spanish and Vietnamese, to meet the ethnic diversity of the community and to ensure communication with our clients.
- c. Ensure that each supervisor/ manager in the Office attends training in the areas of leadership, PIP, and MPP in an effort to build teamwork to better serve the public.
- d. Educate the public and external clients regarding the availability of Clerk-Recorder services and prevention of identity fraud through workshops, community meetings and our web site.
- e. Encourage clients to complete customer satisfaction surveys.

3. Outcome Indicator:

Continue to make available and encourage completion of the customer opinion/ survey form and provide customer outreach.

4. Outcome Indicator Reporting:

Performance Measure	2001 Results	2002 Plan	2003 Plan	How Are We Doing?
What: a. Make Customer Satisfaction surveys readily available in each public service unit of the office.	a. Survey forms available in four locations Document Recording, FBN, Vital Records, Official Records)	a. Survey forms available in five locations (Marriage License Unit, Document Recording, FBN, Vital Records and Official Records).	a. Survey forms available in (6) six locations (archives unit to be added)	Customer survey forms are being made more accessible. Completed surveys are reviewed weekly.
b. Schedule at least one outreach presentation each quarter.	b. One presentation was provided	b. Three presentations were provided	b. Four presentations will be planned	b. Public outreach is continuing to expand.
Why: a. Direct customer input is an ideal means to gauge customer satisfaction or to identify public service problems.				
b. Public outreach is an ideal way to ensure that the needs of the public are met.				

E. GOAL 2- Enhance public record accessibility.***1. Challenges***

Utilization of the internet for transacting volume business is necessary and provides for a cost effective means of conducting business. However, it is important to ensure that methods encompass the highest level of security measures for the accurate and safe transmission of documents, as well as data security for those individuals wanting to access information and records. The demand by the general public to make records more accessible is sometimes in conflict with the need to minimize opportunities for misuse of these same records. Our office continues to work diligently to ensure a balance.

2. Strategy

- a. Expand electronic recording to facilitate expanded national markets.
- b. Install scanners at two (2) additional document recording stations at the front counter to reduce paper handling in the office as well as to lessen mailroom and postage costs.
- c. Continue efforts to influence State legislation to allow electronic recording in all California counties, without jeopardizing Orange County's successful operation.

3. Outcome Indicator:

- a. Move toward a paperless office in various units of the Clerk-Recorder.

4. Outcome Indicator Reporting:

Performance Measure	2001 Results	2002 Plan	2003 Plan Anticipated Results	How Are We Doing?
What: a. Increase the number utilizing Electronic Recording b. Establish front counter internet access where customers can complete forms for automated data entry and submission.	51 Recording Sites N/A	57 Recording Sites Installed program in Marriage License Unit	60 Recording Sites Will evaluate the feasibility to develop program in FBN	Use of Electronic Recording is expanding annually Online operations are expanding within the office.
Why: a & b. This paperless method enables higher levels of errorless transactions with 0 to minimal increase in staffing.				

F. GOAL 3- Safeguard security over the public's records.**1. Challenge**

- It is important to monitor statewide legislation in regards to Public record security. The Clerk-Recorder is taking a proactive role to ensure Orange County's interests are protected in any State legislation regarding issues related to our Office by participating in statewide professional organizations and working with our County legislative committee.
- Implementation of SB 247 in 2003 will increase Department workload by requiring additional identification from the public when requesting Vital Records.

The Office is reviewing automated options for ease of implementation, enhancing information on the web site and working with statewide organizations to ensure consistent implementation practices, while not increasing staffing levels.

2. Strategy

- a. Continue to contract with security consultants to conduct potential systems vulnerability.
- b. Continue to ensure appropriate backup of documents, which meet or exceed State standards for preservation.
- c. Support legislation which incorporates modern technology as a method of record preservation.
- d. Update Memorandum Of Understanding covering the user/provider responsibilities in electronic recording to include additional security measures when necessary.
- e. Integrate an automated accounts receivable system with the existing cashiering system to better account for revenue collection, increase departmental reporting capabilities, and provide a better audit trail.
- f. Reopen the County Archives program.

3. Outcome Indicator

- a. Enhance the Clerk-Recorder's records management plan to include Orange County archival material.
- b. Enhance accountability over the public's revenue, which is collected and disbursed each year.

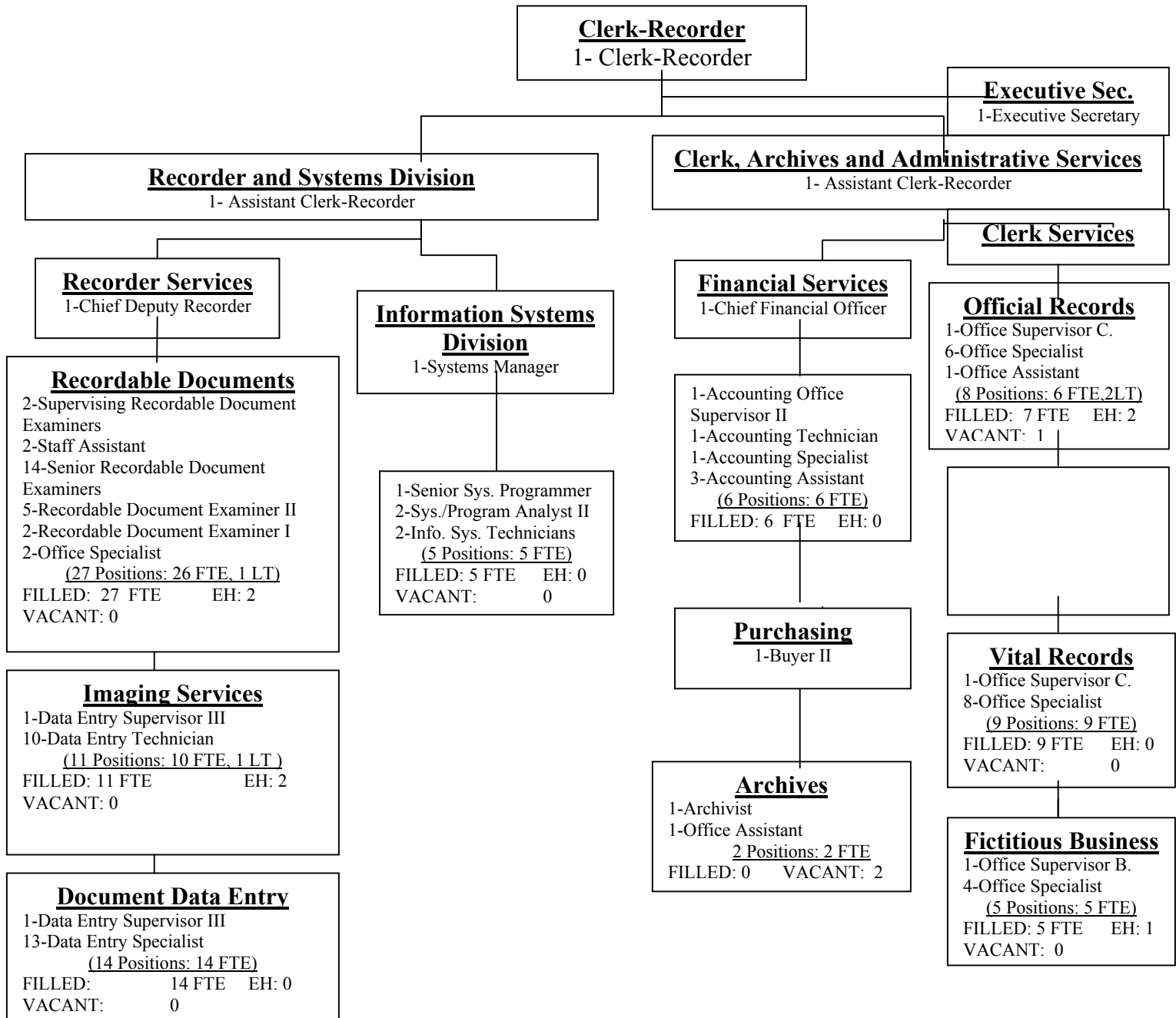
4. Outcome Indicator Reporting:

Performance Measure	2001 Results	2002 Plan	2003 Plan	How Are We Doing?
<p>What: a. Establish an archives program and preserve county records.</p> <p>b. Develop an improved cashiering system with an accounts receivable component.</p>	<p>a. Archives open by appointment only</p> <p>b. Cashiering system plan approved</p>	<p>a. Develop plan to open Orange County archives</p> <p>b. Cashiering system implemented</p>	<p>a. Open the county archives to the public</p> <p>b. Accounts receivable system will be installed</p>	<p>a. Program approved by the Board of Supervisors; recruiting staff and developing criteria now.</p> <p>b. Accounts Receivable system implementation is in process to enhance accountability over funds, provide sufficient audit controls and streamline process.</p>
<p>Why: a. Historical Orange County information should be made available to the public, while preserving it for the future.</p> <p>b. System will provide enhanced security over the public's fees and distributions.</p>				

IV. APPENDICES

- A. Organization Chart**
- B. Management Team**
- C. Labor Management Committee**
- D. Business Plan Team**
- E. Accomplishments**
- F. Client Data/ Trend Indicators**

IV. A. ORGANIZATION CHART



Effective 11-01-02, 102 Reg. Pos

Total FTE: 98

Total L.T.: 4

Total E.H.: 7

Total Authorized 109

IV. B. MANAGEMENT TEAM

Tom Daly, Clerk-Recorder -

Provides overall office leadership to the Clerk-Recorder's Department; oversees the obtaining of goals, offers vision and provides direction in all Department operations and participates in statewide legislative activities.

Renee Aguilar-Ramirez, Assistant Clerk-Recorder -

Provides leadership and direction to assist the County Clerk-Recorder in planning, directing and organizing the operations of the Document Recording, Imaging, Information Systems, Official Records, Marriage License, Fictitious Business, Vital Records, financial services, and Human Resources areas and Data Entry areas.

Lyn Cole, Chief Financial Officer -

Provides direction and support in long-and-short-range financial planning; prepares the annual budget, statistical reports, and oversees the Accounting Unit.

Hieu Nguyen, Chief Deputy Recorder -

Under general direction, assists in planning, organizing, directing, and coordinating the activities of the Recordable Documents, Imaging, and Data Processing functions of the County Clerk-Recorder Office; manages the daily operations of the Division.

Susie Sullivan, Information Systems Manager -

Provides direction in the planning and implementation of information technology to achieve Clerk-Recorder goals and objectives. Major responsibilities include the Clerk-Recorder automation operations, local network operation, and all office technical support.

IV. C. LABOR MANAGEMENT COMMITTEE

The Clerk-Recorder's Office wishes to thank and acknowledge the contributions of the members of the Labor Management Committee.

1. Committee Members

Patti Turner, Cyndi Viall & Darcy Ebberts, Labor Team Members - Builds commitment, provides problem solving, develops ideas, actively participates in process, assists in cost-saving suggestions and provides input to the Business Plan.

Tom Daly, Sponsor - Encourages LMC activities and monitors team progress.

Renee Aguilar-Ramirez, Management Team Leader - Manages the team; builds commitment and leads the team in problem solving. Contributes expert knowledge; gathers and interprets data; provides creative thinking and participates in team building.

OCEA Representative, Facilitator - Focuses on process while remaining impartial; guides the team into selecting tools and methodologies.

2. Key Business Results

The Department's Labor Management Committee works independently and in coordination with LMC teams from the County Executive Office, Clerk of the Board, Registration and Elections and the Orange County Employees Association. Key results in 2002 include:

- Ten (10) ideas for countywide or departmental revenue creation, cost savings, and efficiencies were developed.
- Thus far, implementation of two (2) ideas (bilingual pay review and discontinuation of shortage fees) has resulted in approximately \$20,000 in office savings.
- LMC invited all office employees to be included in the "cost savings ideas" process.
- LMC has brought a couple of employee's issues forward for discussion and management review.

IV. D. BUSINESS PLAN TEAM

Tom Daly- provides input, discusses vision, reviews business plan

Renee Aguilar-Ramirez - provides input, coordinates activities, assists in writing plan

Lyn Cole - provides input, prepares charts, and reviews statistics

Norma Doeve - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Hector Galvan - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Emily Gonzales - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Norma Grijalva - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Phyllis Johnson - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Merilyn Litsey - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Noemy Munoz - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Hieu Nguyen - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Terri Nissen - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Gloria Rivera - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

Susie Sullivan - reviews mission statement, provides plan input, coordinates with unit employees, and reviews draft business plan

LMC - provides input to plan and reviews draft business plan

IV. E. 2002 ACCOMPLISHMENTS

A. RECORDER FUNCTIONS

1. Electronic Recording (ER)

Among major breakthroughs for the Clerk-Recorder's Office in 2002, the number of title and insurance companies that record electronically has grown from 51 in 2001 to 57 users. Electronic Recording (ER) customers submit an average of 2,228 documents daily, with the total number of electronically recorded documents exceeding 1.7 million since implementation in 1997.

Electronic Recording, first introduced by Orange County in the spring of 1997 is of great benefit to both the public and private sectors. In 2002, an enhanced Memorandum of Understanding was implemented with participating ER users to ensure upgraded and enhanced security features.

2. Document Recordings

The Office recorded a record high of one million documents for Fiscal Year 2001-02. These recordings are a result, in part, of interest rates at a 40-year low. Real estate new sales and second deeds of trust recordings continue at high levels.

B. CLERK FUNCTIONS

1. Internet Access

Continued efforts to provide 24/7, access to records via the Internet included making the Fictitious Business Name index and Vital Record ordering available online free of charge this year.

2. Marriage License Application

In October 2002, an automated marriage license application was implemented. This system allows customers to input their license application information into our system. It expedites the application, reduces customer-waiting period, ensures error free license production, and eliminates multiple data entry.

3. Marriage Ceremony Room

On October 22, 2002, the office unveiled its newly remodeled marriage ceremony room. The room has turn of the century décor, offering the look and feel of the Old Courthouse ambiance. The remodel was paid for by marriage license fees, is completely portable (in case of relocation) and offers clients wishing to utilize this civil ceremony service a tasteful and convenient location.

C. DEPARTMENTAL WIDE

1. Automation

Important to the County's future ability to maintain, store and retrieve public records was the acquisition and the installation of a mass storage unit. For the purpose of further ensuring record security, it was relocated to the County's Data Center.

2. Increase Clerk-Recorder Automated Numbering Capability

A major automation project this year was to increase the available document numbering system from 6 to 8 digits. The existing system is programmed to accommodate numbers up to 999,999. Due to record high real property recordings, the office reached one million documents in November 2002. This numbering enhancement required new programming, integration with multiple office systems, and a full conversion.

3. Cashiering System

Installation of a fully reliable, user-friendly cashiering system, which produces accounting reports and related applications, was another significant step forward for the Office in late 2002.

4. Schedules

Office overtime usage was evaluated. Two strategies have dramatically reduced overtime expenses, as well as boosted employee morale. They were:

- Reducing the electronic recording deadline from 4:30 to 4:00 p.m. We continue to have the most "open" hours for title companies and the public in the State.
- Implementing employee flex-time schedules within the office.

5. Operational Efficiencies

Office managers and supervisors meet weekly to discuss unit activities, problems, changes, and departmental improvements. As an outcome of these meetings the office has:

- Developed and distributed our first Department newsletter to improve communications with all staff.
- Developed and distributed Administrative Procedure Manuals that are available within every unit for all staff to reference.
- Created a “staffing assistance” plan for units to share and seek solutions to their peak workload issues.
- Produced a monthly statistical report, which includes workload information, revenue collection and distribution, and budgetary projections.

6. External Coordination and Public Relations

- Working with the newly established Child Support Services Department to electronically record abstracts of judgments.
- Working with the Health Care Agency in the development of shared information and images relating to vital records.
- Working with the District Attorney and DMV in “identity fraud” prevention issues and education.
- Developing a Community Outreach presentation, ***“What Does the Clerk-Recorder’s Office Do for You?”*** which is currently being presented to various community groups, as well as other county agencies.
- Developing and presenting curriculum and manuals for Authorized Notaries who issue confidential marriage licenses.
- Working with Fannie Mae to promote national Electronic Recording.

7. Operational Efficiencies

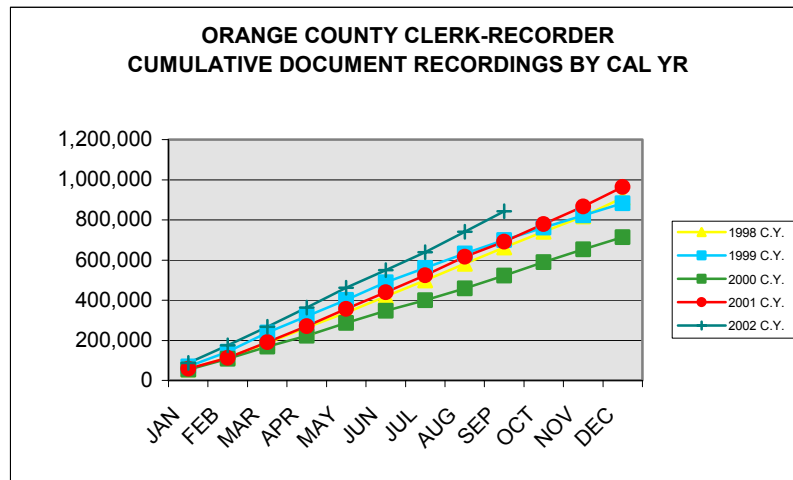
- Implemented a new multi-line telephone system throughout the office.
- Established a procedure for applicants wishing to be deputized as a “deputy commissioner of marriage for a day.”

8. Office Safety
 - Completing the Department Disaster Recovery Plan, which consists of detailed instructions for each unit.
 - Creating evacuation assignments for the Department, to ensure the safety of employees and customers.
 - Having all supervisors and managers enroll and complete safety classes provided by the County.
 - Conducting a safety inspection through CEO/Risk Management and implementing all suggested improvements.
9. Staff Development
 - Ensuring that all supervisors attend leadership and PIP training.
 - Providing supervisors training in the areas of teamwork, interviewing techniques, and problem solving.

IV. F. CLIENT AND WORKLOAD DATA AND KEY WORKLOAD INDICATORS

1. DOCUMENT RECORDINGS

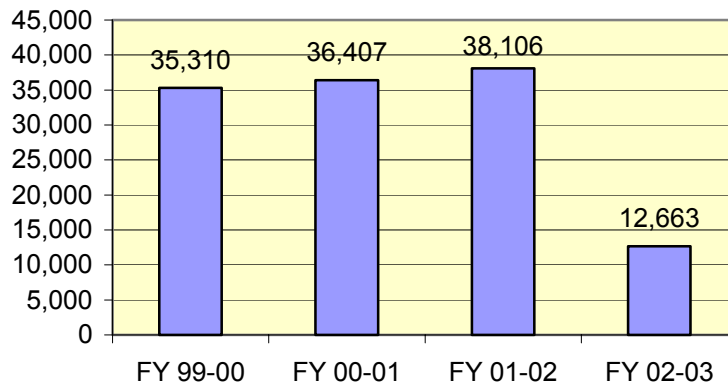
The recording of real property documents is continuing to increase due to record low interest rates and record high real property financing and refinancing. When compared to the first nine months of 2001, current activity has increased by 22% thus far in 2002. This volume is expected to continue through 2002 and well into 2003. Our clients expect and will receive speedy and error free real property recordings.



2. CLERK FUNCTIONS

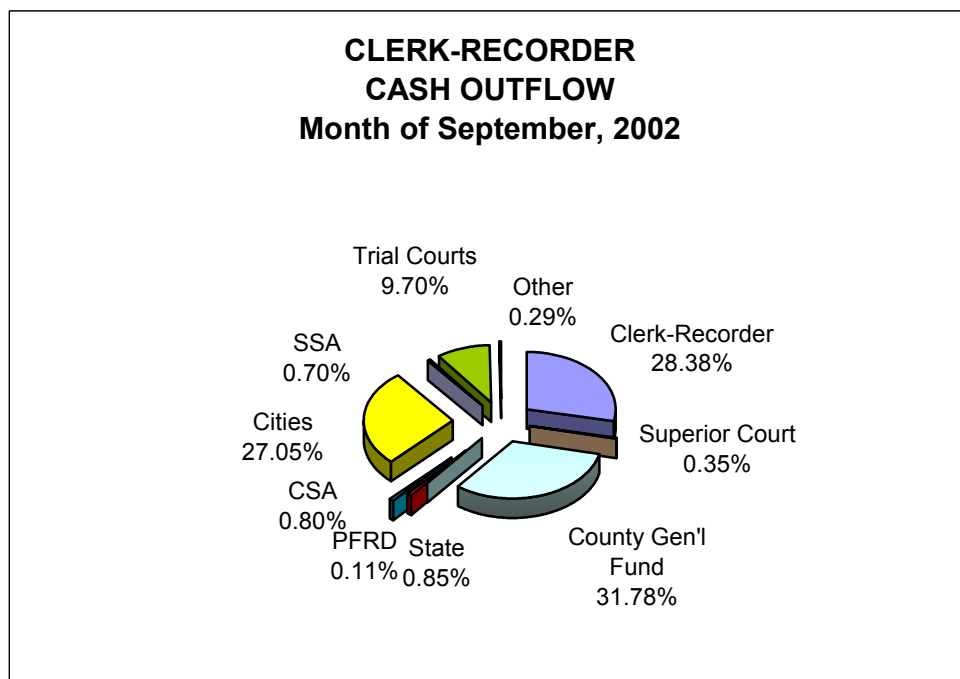
The major Clerk functions in the Office are Fictitious Business Name (FBN) Filings, issuance of marriage licenses and birth, death, and marriage certified copies. These operations increase approximately 5% annually. The economy has prompted the opening of new businesses, thus increasing FBN activity. The issuance of marriage licenses and performing civil marriage ceremonies continues at a steady pace in Orange County. The need for certified copies of birth, death and marriage certificates is on the rise, especially with schools requiring birth certificates prior to enrollment and children's sporting activities record requirements.

As an example of services, FBN activity is provided below:



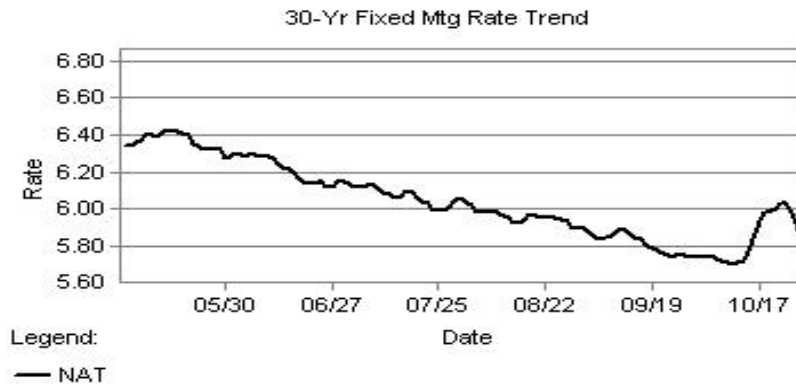
3. REVENUE

The Clerk-Recorder's Office operates at a zero-net county cost. Fees for services provide funding for the entire office operation and provides revenue to the County General Fund to help bridge County funding gaps. Over \$61 million is collected annually, of which the County retains 60%, and 40% is distributed to State agencies and to Orange County cities. A sample month of revenue and distribution is provided below:



4. **RECORDER WORKLOAD INDICATOR**

Interest rates are a key indicator of the number of real property recordings our Office will process. Projections in this regard are not an exact science, however, some trend indicators are useful when projecting workload. Listed below is the national 30-year fixed mortgage rate trend for the last six months.



5. **FUTURE TENDS**

The two most important factors affecting real estate prices are the economy and demographics. The economy goes up and down, but demographics, particularly the baby-boomer generation, just keep rolling along. The following chart shows the long-term effect of this demographic trend.

